

Mitt Romney
Governor

Kerry Healey
Lieutenant Governor

Jennifer Davis Carey
Secretary

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Governor's Conference on Aging
"The Aging of Massachusetts: Inherent Challenges & Opportunities"

Governor Mitt Romney will host "The Aging of Massachusetts: Inherent Challenges & Opportunities" conference at the Boston Convention and Exposition Center on Monday, June 6th.

The Governor's Policy Conference is a gathering of leading professionals, academics and theorists from across the country who will identify both the challenges and the opportunities for Massachusetts and the nation as a result of the aging of the *Baby Boomers*. Expert panelists and attendees will examine the impact of the aging population on business and workforce, civic engagement, community living and fiscal and physical well-being.

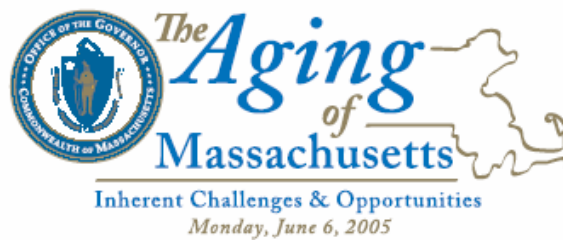
Findings from this event will inform the Commonwealth's recommendations to the decennial White House Conference on Aging scheduled for December. Scott Nystrom, executive director of the 2005 White House Conference on Aging, is one of the keynote luncheon speakers.

"We are excited about this gathering of experts from a host of fields who convened for this important policy conference," said Secretary of Elder Affairs Jennifer Davis Carey.

"The size of the *Baby Boomer* generation, along with the expectations, preferences, needs and wants of this group have impacted life in our nation since 1946, and as they enter their third stage of life, they will continue to transform aging and retirement with their impact on healthcare, housing, the workforce, and the economy. This is our opportunity to engage this well-resourced, well-educated and diverse group and to prepare for their aging."

The conference will begin at 8:15 a.m. with Governor Romney's welcome address. Lt. Governor Kerry Healey will speak at the luncheon at 12:15 p.m. followed by Nystrom and Marc Freedman, president and founder of Civic Ventures.

A conference agenda follows below:



7:30 am - 8:15 am REGISTRATION AND CONTINENTAL BREAKFAST
Sponsored by: John Hancock Financial

8:15 am - 9:00 am WELCOME ADDRESS BY GOVERNOR ROMNEY

- **Jennifer Davis Carey**, Secretary, Massachusetts Executive Office of Elder Affairs
- **The Honorable Mitt Romney**
Governor of Massachusetts

9:15 am - 10:30 am MORNING PANEL SESSIONS

As Massachusetts prepares for the aging of the Baby Boomer generation, it is imperative to examine the impact of this demographic shift on both the public and private sectors. The morning panels will introduce four key areas and present the challenges and opportunities associated with each as a result of the age wave: business and workforce, civic engagement, community living, and physical and fiscal well-being. These are areas in which proactive decisions, policies and actions are necessary now to have a positive impact on our common life in Massachusetts.

TRACK I BUSINESS & WORKFORCE: *Not Just Business as Usual*

Business and the workforce will change significantly, as workers in the Baby Boomer cohort begin to enter retirement and take with them from the workplace sizeable portfolios of expertise. Workers will continue to face the demands of work and the demands of care giving for elder relatives, children, or both. A sizable segment of this population will also remain in the workforce by either choice or necessity.

- **Ranch Kimball**, Secretary, Massachusetts Office of Economic Development
- **David DeLong**, President, David DeLong & Associates and Research Fellow, Agelab, Massachusetts Institute of Technology
- **Lori K. McMillian Bitter**, Partner JWT Mature Market Group
- **Joseph M. Wolfe, Jr.**, Vice President and Treasurer, Draper Laboratory

TRACK II CIVIC ENGAGEMENT: *Imagine All the People* ***Sponsored by: Massachusetts Service Alliance***

As the Baby Boomer generation ages out of the formal workplace, many will at last have the commodity they have longed for during their working lives: time. The current language surrounding volunteering is off-putting to many Boomers and the opportunities to play meaningful roles in unpaid positions are limited. The lure of retirement is compelling to many, while others will meet institutional barriers in attempting to make a substantive contribution. Additionally, this cohort is one of the best resourced, best educated in our nation's history. Effectively tapping the expertise and education housed in this demographic could have profound positive effects on our civic life and serve to address certain social issues.

- **Jennifer Davis Carey**, Secretary, Massachusetts Executive Office of Elder Affairs
- **Malcolm F. Coles**, Atlantic Area Manager, Corporation for National Service
- **Ed T. Eynon**, Senior Vice President for Human Resources, The Cheesecake Factory Incorporated
- **Beth White**, Managing Director, Whiteboard Strategies

10:30 am -10:45 am COFFEE BREAK AND NETWORKING
Sponsored by: Tufts Health Plan Medicare Preferred
formerly known as Secure Horizons

10:45 am -12:00 pm PANEL SESSIONS

TRACK III COMMUNITY LIVING: *Redefining Community*

As we, as a Commonwealth, wrestle with the issues of an aging population, cities and towns and the “villages” and communities of which they are composed, will undergo significant change. Municipalities will face competing needs with respect to taxes, zoning, housing and transportation. Multiple responses will allow the Baby Boomers to remain in the communities that they have helped to create. The changing needs of communities and individuals for housing with supports will offer opportunities to developers and small entrepreneurs.

- **Douglas I. Foy**, Secretary, Massachusetts Office of Commonwealth Development
- **Joseph F. Coughlin**, Ph.D., Director, Massachusetts Institute of Technology, AgeLab
- **Len Fishman**, President and CEO, Hebrew Senior Life
- **Sandy Markwood**, Chief Executive Officer, National Association of Area Agencies on Aging
- **Frederic Mulligan**, PE DBIE, President, Cutler Associates, Inc.

TRACK IV LONG TERM LIVING: *Fiscal & Physical Well-being*
Sponsored by: Fallon Community Health Plan

Projected life expectancies are on the rise, due in large part to advancements in health care and pharmaceuticals and knowledge about healthier lifestyles. It is essential that individuals maintain both their fiscal and physical health in order to sustain their lifestyles as they age. Chronic disease management, exercise, and nutrition will continue to have an effect on the quality of individuals' lives and the cost of health care. Similarly, individuals must prepare themselves financially for when they leave the workforce or experience a sudden change in income. There are clearly identifiable interventions and choices that will affect fiscal and physical well-being.

- **Ronald P. Preston**, Secretary, Massachusetts Executive Office of Health and Human Services
- **Scott Gottlieb**, MD, Resident Fellow, American Enterprise Institute, and Editor, Forbes/Gottlieb Medical Technology Investor
- **Ann Marie Sciammacco**, M.S., R.N., Assistant Vice President of Quality and Health Services, Fallon Community Health Plan
- **Michele Van Leer**, FSA, CLU, ChFC, Executive Vice President, John Hancock Financial

12:15 pm - 1:30 pm LUNCHEON AND KEYNOTE ADDRESSES

- **The Honorable Kerry Healey**, Lt. Governor of Massachusetts
- **Marc Freedman**, President and Founder, Civic Ventures
- **Scott Nystrom**, Executive Director, White House Conference on Aging

1:45 pm - 3:00 pm AFTERNOON SOLUTIONS FORUMS

TRACK I: BUSINESS AND WORKFORCE

Solutions Forum 1: Changing Workforce, Changing Workplace
Sponsored by: AARP Massachusetts

Massachusetts' businesses have already begun to consider and address the challenges and opportunities resulting from a more intergenerational workforce. What ideas, values, and practical solutions are we seeing as business practices evolve in consideration of the needs of workers representing the professional lifespan?

- **Jane Edmonds**, Director, Massachusetts Department of Workforce Development
- **Deborah E. Banda**, State Director, AARP Massachusetts
- **Jeanne Benoit**, Principal Director Human Resources, Draper Laboratory
- **Ian Bowles**, President and CEO, MassINC

Solutions Forum 2: The Business of the Boomers

The aging of the Baby Boomers will provide vast opportunities for niche goods and services. What are some of those needs and services? Who will provide them? How will they be provided? What are the structures in place today upon which we can build? What are the gaps that will need to be filled?

- **Renee M. Fry**, Director, Department of Business and Technology
- **Kelly Stuck**, New Product Development Manager, AARP Services, Inc.
- **Matt Thornhill**, Founder & President, The Boomer Project
- **Sharon Whiteley**, Chairman and CEO, Third Age

TRACK II: CIVIC ENGAGEMENT

Solutions Forum 1: Creating Community through Service

Sponsored by: Harvard Pilgrim Foundation

Two important values for the Baby Boomer cohort are activism and community. Are there ways that the two may be combined to encourage active engagement in civic life?

- **Jennifer Davis Carey**, Secretary, Massachusetts Executive Office of Elder Affairs
- **Edgar Cahn**, J.D., Ph.D, Founder and Chairman of the Board, TimeBanks USA
- **Seymour J. Friedland**, Ph.D Executive Director, Jewish Family & Children's Services
- **Brian Souza**, Executive Director, Boston Partnership for Older Adults

Solutions Forum 2: Planning for Life without 9 to 5

Retirement will be redefined as Baby Boomers transition from formal work relationships with businesses to less restrictive options or use their expertise to create new second careers. What changes must happen to make this accommodation? What options are there for Baby Boomers to fill their time with work, learning, activity, and civic engagement?

- **Cynthia Gillespie**, Counselor to Governor Mitt Romney
- **Debra Shapiro**, MPH, President and Life Planning Consultant, Communities with Purpose
- **Carol A. Greenfield**, President and Founder, Discovering What's Next: ReVitalizing Retirement
- **Kristin McSwain**, Executive Director, Mass Service Alliance

- **Jay Winsten, Ph.D.**, Associate Dean and Frank Stanton Center Director Center for Health Communication, Harvard School of Public Health

TRACK III: COMMUNITY LIVING

Solutions Forum 1: Community Housing

Sponsored by: Cutler Associates, Inc.

The need for a continuum of affordable, accessible, housing with supports is pervasive. What is the real need for such housing across the Commonwealth? What are the obstacles at the state and local level to its development? What is required of developments and individual units and structures to make them usable for a lifetime?

- **Jane Gumble**, Director, Massachusetts Department of Housing and Community Development
- **Valerie Fletcher**, Executive Director, Adaptive Environments
- **Rimma Zelfand**, Chief Executive Officer, Jewish Family & Children Services
- **Kent Larson**, Director, Changing Places, Massachusetts Institute of Technology

Solutions Forum 2: Community Transportation

Sponsored by: Blue Cross Blue Shield of Massachusetts

As citizens age, the need for affordable and accessible transportation becomes an important issue and its availability affects multiple areas of life including socialization, access to medical care, and the ability to remain involved in the community. How can we meet the challenge? What business opportunities may exist to expand the system?

- **Astrid Glynn**, Deputy Secretary of Planning, Massachusetts Executive Office of Transportation
- **William Dowd**, Director, Massachusetts Executive Office of Health and Human Services Transportation Office
- **Katherine Freund**, President, ITN America
- **Wendy Landman**, Executive Director, Walk Boston
- **Barry Michaels**, MSW, Aging Service Specialist, U.S. Administration on Aging

Solutions Forum 3: Community Based Services

Sponsored by: Blue Cross Blue Shield of Massachusetts

Support is unequivocal for a range of services to allow citizens to age in the communities to which they are connected and which they helped to build. What systems, infrastructure and programs are in place to support aging in one's own community? What needs to be enhanced or developed?

- **Gerry Morrissey**, Assistant Secretary, Massachusetts Executive Office of Health and Human Services
- **Neil Chayet**, Principal, Chayet Communications

- **E. Byron Hensley Jr.**, Founder, Senior Link
- **Darlene O'Connor, Ph.D.**, Director, Long Term Care Policy, Center for Health Policy and Research, UMass Medical School
- **Judith Willet**, Executive Director, Beacon Hill Village

TRACK IV: LONG TERM LIVING

Solutions Forum 1: Healthy Aging

Sponsored by: Harvard Partners Geriatric Education Center & Positive Aging Resource Center

Research emerges almost daily on the importance of a healthy lifestyle on physical and cognitive health. What does that research tell us? What can we do to maintain the health of our brains and bodies? What can we do to mitigate the effects of chronic disease?

- **Sally Fogerty**, Department of Public Health, Associate Commissioner of the Center for Community Health
- **Jim Wessler**, President, Mass Alzheimer's Association Massachusetts Chapter
- **Robert J. Schreiber, MD**, Physician-in-Chief, Hebrew Senior Life
- **Jeffrey S. Zimman**, Chief Executive Officer, Posit Science Corporation

Solutions Forum 2: Fiscal Preparedness

While Boomers are one of the better-resourced and educated segments of the population, they are also known for their inattention to savings. In addition, many have been affected by significant changes in pension plans. What can be done to encourage strong financial planning? What are the tools and mechanisms at hand? How will Boomers fare in retirement?

- **Beth J. Lindstrom**, Director, Massachusetts Office of Consumer Affairs and Business Regulation
- **Paula Chauncey**, Managing Partner, être, llc
- **Robert Waas**, Founder, RSW Investments, LLC
- **Helena Chaikin**, Assistant Director Homeowner Options for Massachusetts Elders (H.O.M.E.)

3:00 pm -3:45 pm CLOSING SESSION

- **Jennifer Davis Carey**, Secretary, Massachusetts Executive Office of Elder Affairs